

Montana Department of Public Health & Human Services

Hiring In-Home Help

A Practical Guide for Consumers



Senior and Long Term Care Division

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Hiring In-Home Help Introduction

There comes the point when we may need help to remain in our homes as a result of an accident, prolonged illness, disability or the frailty that comes with age. When this happens, individuals may turn to family or friends. More often, they seek no help and live with reduced abilities due to the fear of having to leave the home. People need not live in fear.



Fortunately, there are options for individuals faced with this situation – ***hire someone to help***. There are two ways to hire help:

1. The helper can be hired from a home health agency or private duty firm. In this instance the home health agency or private firm does the hiring for you.

OR

2. Many find it more affordable to hire an in-home caregiver privately. Under this option, you are responsible for finding, hiring, training, directing and firing your helper. With careful planning and consideration, it is possible to find the right person for the job yourself.

While there are many places to turn for assistance, there is no real “consumer-buying guide” for this type of care. We have put together this booklet to provide you with basic tips designed to walk you through the many facets of hiring in-home help.

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What Kind of Help Do You Need?



In order to hire good in-home help, you need to tell the person you are hiring what they will be doing.

A simple work form can be filled out by the person needing services or by family members. The work form can also be the work contract.

For your convenience, a sample work form is included on the following page. A number of tasks are listed for you to look at, and each task has space to rate the ability of the person and show who is going to provide the care.

If you are already receiving some help, write that you are getting help in the comment section. This will help in keeping track of what you are getting help with and what you are going to need help with.

A few blanks have been left under the task column, in case there are things you need help with that are not on the list. The list is a start and meant for you to complete to meet your specific needs. Maybe you need help with a therapy or exercise program and don't forget to think about chores such as lawn mowing, chopping wood or shoveling snow.

Look over the form after you finish filling it out. Do you need to hire outside help or can you and your family and friends meet the needs? Is there enough back up help if something goes wrong or if someone is unable to help you?



Work Contract

Task	Score	Help	Comment
Bathing			
Dressing			
Grooming			
Transfer (in/out of bed or chair)			
Walking with walker or assist			
Medication assist			
Meal Preparation			
Shopping			
Housework			
Laundry			
Help with paying bills			
Transportation/escort			
Socialization			

Scoring: How do you currently complete each task?

- 0: Independent – Does not need help
 1: With Difficulty – Can manage
 2: With Help – Needs assistance to complete task
 3: Unable – Cannot complete task without assistance

Help: Who is going to help you?

- H: Hire someone to help
 F: Family or Friend; write in who helps you with this.
 S: Self; you manage this on your own.

Define the Job

This is your first step. You have decided to hire a helper. Decide whether to use an agency (such as home health firms) or find a helper on your own. This guide can help you hire on your own.



You have filled out the in-home work form. Exactly what do you want the helper to do? When defining the job, make sure you include at least the following:

- A detailed list of duties to be carried out.
- Statement of wages and benefits.
- Hourly wage, mileage reimbursement, and meals.
- Paid time off; if any.
- Whether the caregiver can bring children to your home.
- Hours of work and schedule.
- Unacceptable behaviors – with the consequences
 - ⇒ Smoking, abusive language, etc.
 - ⇒ Abuse, exploitation, harm
- How to fire the person if things don't work out.
- Signatures of employer and employee (you and the helper)
- All other important employee information.

Having this developed before looking for help, will help you in your selection process. You will also be prepared to hire that “right” person when you find them.

Looking for Help

Now you are ready to find the right person to fill the job description. Getting the word out in many ways can assist you in finding that right person. Here are some options:

- Word of Mouth – Recommendations from a trusted friend or relative
- Job Centers at Colleges and Universities
- Churches
- Senior Centers
- Newspaper Advertising
- Community Centers

Any time an ad is taken out or a flyer is made, consider these tips first:

- Make your job sound appealing
- Include any perks
- Consider an answering service/ PO Box
- Do NOT list your address
- Do NOT list your full name
- Be clear on when to call
- Get advice from the newspaper staff, they may have additional tips



Screening



Once a person calls you in response to your ad:

- describe the job in detail;
- tell them what you expect them to be doing;
- ask some basic questions to exclude unqualified candidates. Consider these questions:
 - ⇒ Do you have experience as a caregiver?
 - ⇒ Do you have a driver's license?
 - ⇒ Are you currently working?
 - ⇒ Why are you attracted to this job?

If the person is still interested, tell them you'll send them a formal application.

Asking some basic questions over the telephone provides you with a first impression of the applicant.

Making the applicant fill out an application and mailing it to you gives you further opportunity to screen the individual.

Having them mail the application gives you time to review qualifications, references, and work history in the privacy of your home without pressure.

If you feel comfortable after looking over the application then schedule the interview and ask them to bring identification.

It is a good idea to schedule the interview somewhere other than your home—community centers, libraries or even restaurants are good places to meet someone.

Interviewing

Sometimes it is helpful to bring another person along to observe and provide a second opinion.



1. Bring the application, notepaper, and additional questions for the interview.
2. Go over the application with the person, asking for more information when the information is not clear or unusual.
3. Then ask other questions. Keep focused and have the person do most of the talking. Take notes to help you remember answers. For additional questions, consider these:
 - Why are you looking for work?
 - How do you feel about caring for another person?
 - Do you have experience cooking for others?
 - What time commitments are you willing to make to stay on the job?
 - Is there anything in the job description that concerns you?
 - Do you have transportation?
 - Have you been bonded?
 - Are you willing to submit to background checks?
 - Can you safely lift or transfer an individual?
 - What kind of training have you had to meet the needs of this job?
4. After each interview is completed:
 - review and
 - finalize notes.

Whether you are conducting one interview or five, this is your record of what was said.

Ready to Hire? Not Yet!

Once you have found someone you like (or two or three) and feel comfortable with them, then complete reference and background checks.



Why?

Knowing that the individual:

- has provided correct information,
- has been successful in this type of work, and
- does not have a criminal record

will add confidence to your decision. It will also protect you from undue harm.

References

You can check references through telephone calls or written requests. Be prepared to ask about work history, ethics and commitment. Don't be surprised if you receive only notification of dates of employment and a statement on eligibility of re-hire from some employers.

Don't hesitate to call personal references. While it may appear to be time consuming, you may find out more about the individual and assist in making the right decision.

Carefully consider the responses. Let the reference know that you may call back if you have additional questions.

Once you have completed reference checks. It is time to consider background checks.

Background Checks

The following resources, pages 11—14, are available to individuals hiring persons to come into their homes:



Nurse Aid Registry

The Certification Bureau of the Department of Public Health and Human Services keeps a registry of approximately 8000 names of certified nurse aides (CNAs).



To be listed on the registry an individual must:

- have completed CNA training,
- passed the state mandated test, and
- completed the CNA application form.

The individual is then certified for two years. To remain registered the individual must complete yearly training requirements.

An individual can lose their certification by:

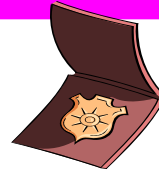
- not meeting annual in-service requirements,
- being convicted of abuse occurring in a nursing facility,
- a bona fide serious allegation, (results in being listed as a perpetrator), or
- not working the minimum eight hours as a CNA.

This registry also tracks home health aides in the same way. A home health aide has an additional 16 hours of training designed to cover providing assistance in a home rather than an institution.

This information is available to employers in the long-term care industry, including consumers. *(That's You!)*

Contact the Certification Bureau at (406) 444-2099.

Montana Department of Justice— Criminal Record Check



Montana Criminal Records Bureau is where all Montana criminal history is kept. The main purpose is to keep and give out information on criminal records as per Montana Law. *As long as you have the consent of the applicant*, you can request criminal records as a condition of employment.

A criminal history record will provide information regarding the people who may be working in your home. The bureau gives out information regarding misdemeanors and felonies committed/prosecuted within the State of Montana.

To ask for a criminal history, get the following:

- Names(s) - aliases or surnames
- Date of Birth
- Social Security Number
- Gender
- Signed Release
- \$5.00 without fingerprints
- \$8.00 with fingerprints. Your local law enforcement agency can help you in getting these prints. This is more accurate and eliminates the possibility of the person saying the record is not theirs.

Often, just saying that you will be getting a criminal background check will stop those questionable people from applying for the job.

Send to:

Montana Criminal Records
Post Office Box 201403
Helena MT 59620-1403

For further information call: 406-444-3625.

After your request is processed, the bureau will send you one of two things:

1. *NO CRIMINAL RECORD*

If the individual does not have a criminal record, your request will be returned with “No Arrest Record Meeting Montana Dissemination Criteria” stamped in red, with the operators initial. This means the person has not been convicted of a misdemeanor or felony within the past five years.

No Arrest Record
Meeting Montana
Dissemination Criteria

2. *CRIMINAL RECORD*

If there is a criminal history, a short description of the conviction(s) will be provided. This includes:

- the person who handled the arrest,
- the name on the record,
- the date of the arrest,
- the charge, and
- the disposition of the charge.

The report will also say if the charge is a felony or a misdemeanor.

County Sheriff Offices



As of July 1, 1997, Montana has had a Sex & Violent Offender Registry.

Local officials keep this list up to date. Requests for information need to be made to your local county sheriff's office. This information is also available on the Internet.

You can check the Montana Sexual and Violent Offender Registry at:

<http://doj.mt.gov/svor/>

then click on the icon for "sexual and violent offender registry".

Receiving this type of information may help you make an informed decision.

Individuals with a past history of assault, theft, domestic abuse, exploitation and the like, **may** prey on seniors or individuals with disabilities.

While some individuals reform and become contributing members of society, it is in your best interest to consider previous charges seriously. Consider discussing the issue with the applicant to get a better idea of what occurred.

Now You Can Offer the Job!

After the interview, reference and background checks, you may have found the right person to fill the job.

- * Let the person know as soon as you decide.
- *
- * Set up a time to meet with them in your home.
- *
- * Review the work contract in detail.
- *
- * Establish a schedule.
- *
- * Go over the layout of your home.
- *
- * Discuss rules.
- *
- * Finalize wages.



Employer Issues

Hiring of in-home help makes you a *Household Employer*.

There are many issues regarding:

- taxes,
- liabilities, and
- employment eligibility.



It is time to consult with your insurance agent and your tax professional to make sure you follow proper procedures.

You need to make sure that:

- your household insurance (renter's or homeowner's) covers household employees in case of an accident,
- your automobile coverage is adequate for the person to drive your car if you allow this, and
- that you are fully informed of the legal responsibility for paying taxes for household employees.

Paying Taxes

Either consulting with a tax professional or reviewing IRS publication #926, Household Employer's Tax Guide can help you with this. This publication will help you decide whether you have a household employee and, if you do, whether you need to pay federal employment taxes. It explains how to figure, pay and report social security taxes, Medicare tax, federal unemployment tax, and federal income tax withholding for your household employee. It also explains what records you need to keep.

The IRS summarizes household employer responsibility as follows:

<i>Household Employer's Checklist – What you may need to do:</i>	
When you hire a household employee:	Find out if the person can legally work in the US. Find out if you need to pay state taxes.
When you pay your household employee:	Withhold social security and Medicare taxes. Withhold federal income tax. Make advance payments of earned income credit. Decide how you will make tax payments.
By February 1	Get an employer identification number. Give your employee Copies B, C, and 2 of Form W-2, Wage and Tax Statement
By March 1	Send Copy A of Form W-2 to the Social Security Administration
By April 15	File Schedule H, Household <i>Employment Taxes</i> with your federal tax return.

You can reach the IRS via their web site at www.irs.ustreas.gov or by calling 1-800-TAX-FORM (1-800-829-3676).

For ***state unemployment taxes*** contact:

The Department of Labor and Industry
PO Box 1728
Helena MT 59620
406-444-2747

For ***state income tax withholding*** contact:

The Department of Revenue
Income and Miscellaneous Tax Division
PO Box 202701
Helena MT 59624
406-444-0269

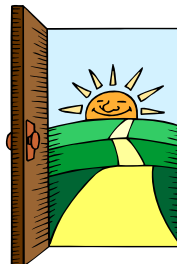
Keeping Your Helper

Now that you have found the right person, wouldn't it be great to keep them?

All employees, regardless of their line of work, want to feel appreciated.

Consider the following:

- Offer a pleasant working environment that is enjoyable.
- Be clear when giving directions.
- Understand the helper's need for time off due to illness, injury or a vacation.
- Listen to their suggestions.
- Discuss schedule changes in order to meet everyone's needs.
- Say "Thank You" for a job well done.



When Problems Happen

Unfortunately there are times when problems do arise. There may even be a time in which an in-home helper needs to be fired. This can be a difficult position for the employer.

Use the work contract to stress job duties and consequences of unacceptable behaviors.



Abuse, Neglect, or Exploitation

A caregiver, paid or non-paid, should **NEVER** be allowed to inflict physical, verbal or mental harm, or exploit you or your assets. You can avoid someone knowing what your assets are by keeping your financial, and personal information private and confidential. Do not share any information about your checking, savings, or financial accounts or let someone know where your assets, like jewelry, may be in your house.

Remember



*Keep personal information to yourself —
Do NOT share private and confidential information.*

If anything like this happens, ***call the police.***

Do not wait to discuss this with your hired help.

Termination of the individual can occur after you have filed a police report.

Discipline

Many employers use progressive discipline to correct the action of employees. Progressive discipline includes:

- a verbal warning,
- a written warning, and finally
- job termination.


Terminating an Employee

It is wise to have another person with you or consider dismissing the employee over the telephone. The following are some examples of what you might say:

“I’m sorry, but I don’t think that things are working out. I need someone who (is stronger, can drive, can work more flexible hours, has more experience, etc.). Thank you for your time and your help.”

“You’re falling down on the job. You arrive between a half hour and an hour late and you have missed several workdays without notice; I need someone more dependable. I am sorry, but I have to give you notice of termination.”

If you have to terminate an employee:

- keep accurate documentation of the event and reasons for termination. This will protect you in case of a later dispute.
 - keep employment records for a while.
 - do not forget to collect keys or other items that belong to you.
- 

In closing...

Your home is where you are the most comfortable and where you can be your true self. When prolonged illness or frailty occurs, it is possible to remain at home with quality in-home help.



*The key is to:
evaluate, organize, and plan.*

Acknowledgements

The following resources were utilized to develop this guide:

Duffield, Diane; MT Department of Justice, Identification Bureau

Family Caregiver Alliance Web Site; www.caregiver.org

Internal Revenue Service Web Site; www.irs.gov

Paraplegia News, Volume 49, No. 1; pp. 16-17.

Suisk, D. Helen, Hiring Home Caregivers, Impact Publishers, 1995.

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